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ABSTRACT

Eight school systems with enrollments of 50,000 to 77,000 and selected systems reported by the NEA research division as having some type of merit provision in the salary structure were surveyed by telephone. School systems in the first group surveyed reported any existing merit pay plans, any such plans being considered for the future, or any abandonment of such plans. The second group of school systems described their plans. Results of the survey revealed that not one district contacted has a currently operational merit pay plan. The author concludes that the larger the school district, the less likely it is to have a merit pay plan. However, depending on the definition of merit pay, many school systems have some salary provisions that would fit isolated definitions of merit pay. Appendixes include the questionnaire instrument and a progress report on the development of the San Diego city school merit pay plan. A related document is EA 004 747. (JF)

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WICHITA PUBLIC SCHOOLS
Unified School District 259
Dr. Alvin E. Morris, Superintendent

1971-72 SURVEY OF MERIT PAY PLANS IN PUBLIC SCHOOL SYSTEMS

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March, 1972

EA 004 748

1971-72 SURVEY OF MERIT PAY PLANS IN PUBLIC SCHOOL SYSTEMS

BACKGROUND

During November, 1971, the Board of Education of Unified School District No. 259 Wichita, Kansas passed a motion jointly approved by the Executive Board of NEA - Wichita that the Superintendent appoint a committee of educators and lay citizens to study merit pay plans and report back to the board by mid-March, 1972. Early in December, 1971 the Research and Evaluation Services Division was asked to assist in conducting a survey of systems who have in the past had merit plans in effect or who currently have merit pay plans.

SURVEY PROCEDURE

Initially, 26 school systems were identified from the list of Population, School Population, Superintendents, and Director of Research in Largest Cities in the U.S., prepared by the Houston, Texas Independent School District in February, 1971. Ten systems selected from this list had pupil enrollments between 50,000 and 77,000. (This was considered the size range for Wichita with a 1970-71 pupil enrollment of 63,811.) Included in the list several systems in the Mid-West or same geographical area as Wichita. Interview questions were developed so that information could be collected by phone interviews with the Director of Research or other appropriate person in the districts selected.

Questions used were designed so that replies to particular questions branched to other series of questions depending on the reply to the first question. A copy of the questions used is included in the Appendix. It should be noted that some variation in questions was expected depending on

the individual respondent. Phone conversations were recorded on tape after permission to do so was granted by the respondent.

After completion of the first portion of the survey, a verbal summary was presented to the committee. The survey continued with eight districts selected from systems reported in either the NEA Research Division Research Report 1970 R12 or Research Report 1971 R12 as having some type of merit provision in the salary structure.

A slightly different set of questions was designed to elicit information from districts with merit plans. A copy of these questions is also contained in the Appendix. Once again, variation in questions was dependent upon individual respondents. Results from the second portion of the survey were also verbally presented, along with other materials, to the committee on February 15, 1972.

FINDINGS

The procedure indicated that 10 public school systems in the Wichita size range (50,000 to 77,000 pupils) were to be selected. Successful contact was made with the Director of Research in eight of the 10 selected districts. Four of the 10 districts were in the Wichita region. Those districts were: Oklahoma City, Oklahoma; Tulsa, Oklahoma; Kansas City, Missouri; and Omaha, Nebraska. The other four districts were: Pittsburg, Pennsylvania; Long Beach, California; Baton Rouge, Lousianna; and Anne Arundel County, Annapolis, Maryland. Respondents in all eight districts reported that no merit pay plan was currently in effect in their districts and only two (Kansas City, Missouri and Pittsburg, Pennsylvania) reported that they ever had any merit pay provision in their salary

structure. Five of the eight districts had at some time studied, discussed or considered the possibilities of a merit plan either as the result of a board member inquiry or administrative review.

All eight districts reported that teachers' salaries were scheduled and that progress is normally one step increase until reaching the final step according to educational preparation level. Administrative salaries are in some cases scheduled and in other cases determined individually or a combination of the two. Systems without scheduled salaries for all administrators may have some elements of merit pay provisions if performance is a criterion used in determining individual salaries.

All eight systems reported some type of personnel evaluation. In general, there is an annual evaluation of probationary teachers (usually three years) and then periodically after that period. In some cases, there is an annual rating or evaluation of all certificated personnel. Most systems use some type of rating form or checklist of traits as a tool in the evaluation process. All systems reported these as subjective measures and some variation in the number and type of persons involved in the evaluation precedure.

All respondents in this group reported that there was provision in the salary structure for extra pay for extra work and/or responsibility. Positions such as coaches of sports, department heads in secondary schools, band directors, etc., were among those provided for as extra pay positions.

Opposition to merit pay was reported as varying from very little to nearly everyone. On the other hand, there have apparently been no strong moves toward developing and implementing merit pay systems in

recent years. A summary by system for the above-mentioned systems is presented in Table I in the Appendix.

The second portion of the survey consisted of selecting among systems which had recently reported merit pay provisions. From the list of systems reported in the 1970 R12 or 1971 R12 Research Reports of the NEA Research Division, eight school districts were selected as having merit pay provisions. The districts selected varied in enrollment from about 10,700 to 75,000 pupils. The districts selected were Muscogee County, Columbus, Georgia; Parkway District, Chesterfield, Missouri; Wichita Falls, Texas; Wauwatosa, Wisconsin; Portland, Oregon; and Livonia, Michigan. One additional district, San Diego, California, was added as a result of information obtained from an earlier call.

Five of the eight selected districts were contacted by phone for interview information. In each case, the Director of Personnel was the respondent for each district. In four of the five systems reached, the respondent indicated that, in his opinion, that system had never had what he considered a "merit pay" provision in the salary structure. Wichita Falls, Texas was the only district contacted in which the respondent said a merit pay plan was in use for a period of time. However, it is not in effect for the 1971-72 school year, except for those (approximately 50 persons) who are still receiving stipends for the remainder of a five or 10 year period.

The plan used in Wichita Falls, Texas can be described as one based on years of teaching experience and additional graduate hours of educational preparation. The plan was applicable only to teachers and required an application in order for the teacher to be considered. A copy of the

plan and eligibility form are included in the Appendix.

The respondent indicated the following as the reason for abandoning the plan even though, in his opinion, it had been quite successful. The State of Texas now has a funding provision which requires matching funds from the local districts to upgrade all salary provisions. In order for the Wichita Falls system to meet this requirement, the system could no longer provide monies for the merit stipends as they had in the past.

The other four districts, Muscogee County, Columbus, Georgia; Wauwatosa (Milwaukee), Wisconsin; Livonia, Michigan; and Portland, Oregon had respondents who indicated that, in their opinion, no "merit pay" provisions were in existence now, and in some cases, had never existed in those systems. A brief summary of responses from the four systems mentioned above is included in the Appendix.

SUMMARY

The merit pay survey was conducted in an attempt to answer two sets of questions. First, are there school systems in the Wichita enrollment size group that have unreported merit pay plans, are they currently considering or developing a merit type plan, and have they had merit plans in the past and abandoned them? Secondly, among systems having some reported provisions for "merit pay," what are these provisions, what are the guidelines and procedures, is the plan etc. described in writing, and what has made the plan successful?

Telephone interviews with Directors of Research in eight districts in the Wichita size group revealed that no district contacted currently

has what respondents considered a "merit pay plan." There may, however, be pay provisions in those districts that would be included in some definitions of merit pay.

Directors of Personnel, in five districts reported to have some merit pay provision, were contacted by phone. None of these respondents reported merit pay plans in effect this year. One of the five, Wichita Falls, Texas, had to abandon their plan this year. The reason for abandoning this plan was not a reported lack of success, but other financial reasons.

One additional call yielded information and results of committee work completed in one large urban district in California.

Results of this limited survey, (fourteen telephone contacts) revealed that no district contacted currently has an operational merit pay plan. Five of the fourteen were reported as having some type of merit pay provision in the salary structure for those districts.

CONCLUSIONS

Based on this survey, previous surveys, and reported information related to merit pay plans, the larger the school district, the less likely one would find "merit pay" provided on an individual basis in public school systems. However, depending on the definition of "merit pay," many school systems have some salary provisions which would fit particular definitions of merit pay. All, or nearly all, of the larger school systems (enrollments of 25,000 pupils or more) have some type of salary schedule for teachers which recognizes additional educational preparation, and years of teaching experience. This is one way to reward en masse those who presumably will be producing better educational

experiences and products in public school systems.

This survey revealed some of the same problems that were found in a survey conducted by the NEA Research Division in July, 1960. At that time, 38 percent of 71 reporting systems either denied that a merit plan ever existed or had been adopted. Merit pay was defined (in 1960) as any form of pay which exceeds scheduled maximums. It would be very difficult to get a uniform acceptance nationwide, then or now, of a definition of "merit pay." Telephone interviews in this survey showed that some say they do not have a "merit plan," however, extra pay positions do exist. Some teachers receive more than maximum scheduled salaries for other reasons, and in some systems many administrators' salaries are individually determined, which might imply that performance of a task is a determining factor. The value of information gained by utilizing this technique is severly limited in that only a very few schools systems were involved, and in some cases, the person interviewed was unable to provide what may be considered an accurate historical picture of pay provisions in the system for a long period of time. Even with the limitation of this approach and this particular survey, the indications are that not many systems are saying that they have "merit pay" as such.

APPENDIX

QUESTIONS FOR LARGE CITY SCHOOL SYSTEMS (50,000-77,000)

Telephone contact to be made with the Director of Research to obtain responses to questions regarding "merit pay." If he is unable to respond, obtain the name, title, and telephone number of another person on the staff who can respond.

Nature and Purpose of Inquiry

Indicate the background and reason for conducting this survey and ask permission (as needed) for recording responses.

Then say -

We are interested in gathering information regarding "merit pay" activities among school systems in our size range. "Merit pay" may include the following elements - super maximums, moving persons more than one step on the salary schedule, additional compensation for outstanding performance, extra pay for extra work or responsibility, and/or special grants.

Questions -

1. Do you now have any type of merit pay plan for teachers or other professional personnel? (If no, branch to question 10.)

2. If so, what are the purposes of your plan? (e.g. Reward for excellence in teaching, encourage better pupil performance, or upgrade teachers salaries.)

3. How long has the plan been in effect?

4. Do you have guidelines, administrative procedures, or evaluation tools available in writing? If so, may we have copies of these materials?

5. Is there a limit to the number or percent of the staff who can receive merit pay for any given year?

6. Who initiated the plan? Who developed the plan? (e.g. teachers, administrators, lay persons)

7. How much money is budgeted or set aside annually to pay persons receiving "merit pay"?

8. Has any study been made regarding the effectiveness of "merit pay" on teacher or pupil performance? (If not, get an opinion on the effectiveness of the plan.)

9. Has there been opposition to the plan? Who opposed? What was the extent of opposition?

10. Is your system currently considering any type of merit pay plan? (If no, branch to question 17)

11. If so, at what stage of development of the plan are you?

12. Who initiated the present interest or study of "merit pay" in your system?

13. What are the main features of the (proposed) plan?

14. Do you have in writing, the purposes, guidelines, administrative procedures, and evaluative tools for the plan? If so, may we have copies of any or all of that material?

15. How much money is proposed to annually budget or set aside to implement merit pay compensation?

16. Has there been opposition to the plan? By whom? To what extent?

17. Has your district ever had any type of "merit pay" in the past?

18. If so, when? How long did it last?

19. What was the primary reason for abandoning the plan?

20. Are professional (certificated) personnel in your district paid on the basis of a salary schedule?

21. Do you have procedures which result in regular evaluation of professional (certificated) personnel?

22. Do you have any general comments related to "merit pay" or "merit pay plans"?

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QUESTIONS FOR SYSTEMS REPORTED TO HAVE SOME TYPE OF MERIT PAY PLAN

Telephone contact to be made with the Director of Personnel or someone he designates to respond to questions regarding the reported merit pay plan.

Nature and Purpose of Inquiry

Indicate the background and reason for conducting this survey, and ask permission (as needed) for recording responses.

Then say -

> According to information reported in the NEA Research Division report, 1970 R-12 or 1971 R-12, your district now has some type of "merit pay" for teachers.

Questions -

1. Is this correct?
2. If so, can you describe the main features of the plan?
3. Is the plan described in writing? Are there guidelines, administrative procedures, etc.? If so, may we have copies of these materials?
4. How long has your plan been in effect?
5. What are the purposes of the plan?
6. What constitutes "merit"?
7. What are the procedures for identifying and selecting person considered for merit?
8. Do you have regular procedures for evaluation of certificated personnel? How frequently do these occur? Do these in any way determine persons selected for "merit"?
9. Is there a limit to the number or percent of the staff receiving "merit"?
10. Described briefly how the "merit plan" was developed in your system.
11. In your opinion, how effective has the plan been?
12. Has there been any study of the effects of "merit pay" on teacher or pupil performance?
13. Has there been opposition to the plan? By whom?
14. Do you have any general comments related to "merit pay" or "merit pay plans"?

TABLE I

SUMMARY OF RESPONSES ON MERIT PAY
SYSTEMS WITH PUPIL ENROLLMENTS OF 55, 000-77, 000 (cont'd)

System, City, State	1970-71 Enrollment	Currently Considering or have Merit Pay	Had Merit Pay in Past	Scheduled Salaries	Reason, if any, for not having Merit Pay	Evaluation of Personnel	Type of Extra Pay Position	Who Opposed or Opposes Merit Pay	Other Comments
Pittsburg, Pennsylvania	72, 722	No	Had merit pay at one time - did not work out.	Salaries based on Annual raises only.	Did not work out	Uses regular Evaluation forms from state. All public schools uses the "State Form" for evaluation. A 2nd form is being studied and used now. Satisfactory or unsatisfactory and reason. Also, statement for rating. Evaluation once a year.	Summer teaching Special Training. Extra responsibilities. Team Leader Additional $300 1st year and additional $600 the 2nd year.	Most everyone	An "Instructional Leadership Program" was organize 1960. Team Leaders was selected by Principal, Supervisors, Directors of Program. NEA not opposed to Teams Leadership. Program very effective so far. No actual studie have been made though
Long Beach, California	68, 557	No Considered by individual Board member only - had no direction to carry it further	No	Single Salary schedule for teachers and Administrator. Not Indexed but both teachers and Administrators are related in a sense. Advance only by job reclassification or moving up to new position.		Teachers are checked very closely during a 3 year probation period by Principal. Start next year, every permanent employee will be checked each 2 years.	Department Heads Summer teaching Curriculum writers No supplement pay in Elementary level.	Informally the Executive Director of NEA was not against merit pay.	NEA Affiliated

TABLE I

SUMMARY OF RESPONSES ON MERIT PAY
SYSTEMS WITH PUPIL ENROLLMENTS OF 55,000-77,000 (cont'd)

System, City, State	1970-71 Enrollment	Currently Considering or have Merit Pay	Had Merit Pay in Past	Scheduled Salaries	Reason, if any, for not having Merit Pay	Evaluation of Personnel	Type of Extra Pay Position	Who Opposed or opposes Merit Pay	Other Comments
Omaha, Nebraska	63,024	Have not formally considered merit pay. 4 or 5 years ago made a cursory study.	No	Indexed Teacher Salary Schedule Longevity pay at 25 years $200.	No uniformity in who decides who receives merit and on what criteria. Biggest problems are evaluating and selecting personnel for merit	Have recently modified tool for probationary teachers. Evaluation each year, others each 2 years. No formal evaluation for Administrators	Coaches Band Directors Summer teachers Pay for added time. Not Indexed % of B.A. base.	Teachers Association and Administrators based of evaluation and selection	Will send copies of evaluation tools and salary schedules
Kansas City Public Schools, Kansas City, Missouri	70,651	Proposed from time to time usually by board member. Last one about 4 or 5 years ago.	Yes, in the 1930's. Add on to top of teacher schedules	Single Salary Schedule, Teachers and Administrators policy not to maintain Indexing	Personnel felt some got preferential treatment.	Did not develop written guideline for merit plan. Evaluation form for Administrators may or may not be rated. (Subjective) Teachers are evaluated each year during probation period consisting of 3 years. Might go to annually rating.	Coaches etc.	Those in it(30's) felt preferential treatment was present. AFT now bargaining unit.	

TABLE I

SUMMARY OF RESPONSES ON MERIT PAY
SYSTEMS WITH PUPIL ENROLLMENTS OF 55,000-77,000 (cont'd)

System, City, State	1970-71 Enrollment	Currently Considering or have Merit Pay	Had Merit Pay in Past	Scheduled Salaries	Reason, if any, for not having Merit Pay	Evaluation of Personnel	Type of Extra Pay Position	Who Opposed or Opposes Merit Pay	Other Comments
Anne Arundel County Annapolis, Maryland	74,151	Study underway in differentiated staffing. Developed some selection process and evaluation package. (May implement next year in pilot situations in high school area.) Developed some guidelines.	No	Teachers formula for paying Administrators, Directors, and above are negotiated with Superintendent		Administrators are evaluated except Directors or above. Rated on 3 point scale. Form for teachers and scale for Administrators	Sports Drama Plays Athletic Director	Not much except for some small groups	Idea came from Superintendent and Staff. Development 2 years of plan and Develop TAAC joined in study. Will send forms and schedules
Baton Rouge, Louisiana	63,476	No	No	Proposed that all things should relate to teachers salaries for entire system. One step raise annually to 5 years, than $100 raise every 5 years. NO (2) steps at one time. Annually raises only.	Teachers are all against merit raises.	Evaluate everyone annually. Evaluate forms are used for teachers and Administrators.	Coaches Band Directors Homemaking etc.	All teachers are opposed. No organization, just teachers.	Will send evaluation forms.

TABLE I

SUMMARY OF RESPONSES ON MERIT PAY
SYSTEMS WITH PUPIL ENROLLMENTS OF 55,000-77,000

System, City, State	1970-71 Enrollment	Currently Considering or have Merit Pay	Had Merit Pay in Past	Scheduled Salaries	Reason, if any, for not having Merit Pay	Evaluation of Personnel	Type of Extra Pay Position	Who Opposed or opposes Merit Pay	Other Comments
Oklahoma City, Oklahoma	72,010	No serious thought given. Discussed several times but inability to find a plan which all would consider fair. Central Administrative Staff on Merit Pay including 40 employees (Assistant Director) (Department Heads) and all Central Administrators	No	Teachers on schedule. Do not use Indexing or Comparison of the teachers and principals salaries.	Inability to find a plan which all would consider fair.	Evaluation tools are used primary for Professional Inservice training improvement. All forms becomes part of teacher personnel record.	Additional work get additional pay.		
Tulsa, Oklahoma	77,763	No	No	Everyone on Fixed Index Schedule For advancement a position is advertised for a period of 20 days. Any one can apply for advancement.		Systematic and regular ways of evaluation. Procedures revised in last 2 years.	Team Leaders Additional work for additional pay. Coaches Department Heads Band Directors Curriculum writers	General no complaints. Strong request for Open Space Schools	

WICHITA FALLS PUBLIC SCHOOLS
Wichita Falls, Texas

CERTIFICATES OF MERIT

The Board of Education, in its continuing efforts to encourage excellence in teaching, has approved a plan for recognizing such excellence through Certificates of Merit. These certificates will be of three types:

1. Certificate of Merit - awarding a stipend of $144 each year for five years
2. Professional Certificate of Merit - awarding a stipend of $216 each year for five years
3. Master Teacher Certificate - awarding a stipend of $376 each year for ten years

The certificates are intended for classroom teachers and only those teachers who are being paid on the regular teachers salary schedule will be eligible to receive an award. Awarding these certificates will be predicated on three things - tenure, college credit, and performance in the classroom. Eligibility and qualifications for the awards will be as set forth below:

PREREQUISITES:

A. Certificate of Merit

1. Bachelor's degree
2. Five years teaching experience
3. Three years continuous tenure in Wichita Falls
4. Nine hours college credit which must meet the following requirements:
   a. Must be completed after employment in Wichita Falls
   b. Must be completed not more than five years prior to date of application for evaluation
   c. Must be of graduate level

B. Professional Certificate of Merit

1. Bachelor's degree
2. Certificate of Merit (10 years teaching experience and 3 years continuous tenure in Wichita Falls may serve in lieu of the Certificate of Merit in meeting this requirement.)
3. Completion of twelve hours college credit which must meet the following requirements:
   a. Must be completed after employment in Wichita Falls

b. Must be completed not more than five years prior to application for evaluation

c. Must be of graduate level

d. Must be different from that used in establishing eligibility for Certificate of Merit

4. Six hours of approved educational experience may be submitted in lieu of six hours of the above requirement.

C. Master Teacher Certificate

1. Bachelor's degree

2. Professional Certificate of Merit (15 years teaching experience and 3 years continuous tenure in Wichita Falls may serve in lieu of the Professional Certificate of Merit in meeting this requirement.)

3. Completion of eighteen hours college credit which must meet the following requirements:

a. Must be completed after employment in Wichita Falls

b. Must be completed not more than five years prior to date of application for evaluation

c. Must be of graduate level

d. Must be different from that used in establishing eligibility for Certificate of Merit or Professional Certificate of Merit

4. Six hours approved educational experience may be submitted in lieu of six hours of the above requirement.

EVALUATION:

A. College credit prerequisites must be submitted, along with transcripts, on the form provided on or before September 15th of the school year during which evaluation is requested.

B. Evaluation will be made during the school year immediately following request.

C. Evaluation will be made by administrators and supervisors directly concerned with the area of teaching.

D. Evaluation will give emphasis to excellence in teaching over and beyond the quality expected of any well-trained teacher.

AWARD:

A. If, in the opinion of the evaluating team, the teacher meets the requirements set forth above, the teacher shall be notified in writing and the additional stipend will be added to the contract for the following school year and for each school year thereafter for five years.

B. Any break in the continuity of tenure for any reason other than official leave will terminate the certificate.

C. In event the teacher is judged as failing to meet the standards set forth above he will be entitled to a conference at which time full explanation will be given.

D. Upon recommendation by the Superintendent of Schools and the Teachers Committee of the Board of Education, the Board of Education may waive any or all of the above requirements so as to reward outstanding service to the youth of the community.

Adopted by Board of Education
April 2, 1962

WICHITA FALLS PUBLIC SCHOOLS
Wichita Falls, Texas

ELIGIBILITY DATA FOR CERTIFICATES OF MERIT

Date_____

I. PERSONAL DATA:

Name_____ School_____

Present Assignment_____

Present Salary Status: (Underline one) Regular Schedule, Certificate of Merit, Professional Certificate of Merit, Master Teacher Certificate

II. PROFESSIONAL IMPROVEMENT DATA:

A. College courses completed (Transcripts must be on file in Superintendent's office)

Course Name	Course Number	College or University	No. Hrs Credit	Date Completed

B. Other professional experiences and dates (i.e. travel, publications, etc.)

_____

_____

_____

_____

_____

_____

I submit the above data as partial fulfillment of the requirements for the Certificate of Merit, Professional Certificate of Merit, Master Teacher Certificate. (Underline one.) I understand that the awarding of the Certificate is contingent upon favorable evaluation of my classroom performance and professional attitude.

Signature: _____

SUMMARY OF RESPONSES
FROM DISTRICTS REPORTED TO HAVE MERIT PAY

System - Muscogee County Public Schools
City - Columbus
State - Georgia

1971-72 Enrollment - 41,644

Type of Merit Reported

Schedule may be exceeded for meritorious performance by board action.

Response Summary

Respondent indicated that no merit plan existed as reported. The system has a single salary schedule with extra pay for extra work positions. The teacher association (NEA affiliate) is opposed to "merit pay." Respondent considered the subject of "merit pay" to political, particularly in that region, to become to involved because of problems generally associated with it.

System - Wauwatosa Public Schools
City - Milwaukee
State - Wisconsin

1971-72 Enrollment - 10,810

Type of Merit Reported

Schedule may be exceeded for meritorious performance by board action.

Response Summary

Respondent was the Director of Personnel for Milwaukee Public Schools. He indicated that he had no knowledge of merit plan in Wauwatosa or Milwaukee systems. There are, however, extra pay for extra work positions. Respondent indicated that he would check with other suburban systems in that area and send information if available.

System - Livonia Public Schools
City - Livonia
State - Michigan

1971-72 Enrollment - 38,237

Type of Merit Reported

Schedule may be exceeded for merit but amount not indicated. Long-service increments indicated but amounts not stated.

Response Summary

Respondent indicated that there are two levels on the salary schedule with a $40 differential between level one and level two on the salary schedule. Approximately 97 percent of the teachers proceed to level two with four years of experience and the recommendation of the principal. The respondent did not consider this a type of merit pay. He also indicated that this was the first year his office had not completed the questionnaire for the NEA Research Division. He sent it to the local NEA affiliate for completion and return to the Research Division.

System - Portland Public Schools
City - Portland
State - Oregon

1971-72 Enrollment - 74,989

Type of Merit Reported

Report indicated an extra set of dollar amounts above scheduled maximums with Merit indicated in parentheses.

Response Summary

Respondent indicated no merit plan as such. Additional salary is provided for extended responsibility assignment, a type of extra pay for extra work. Portland does have a longevity provision for those on the top step of the schedule for five years. This difference for longevity was apparently the notation reported as merit. Portland also has special contracts for teachers in special projects which the Teachers' Association calls "performance contracting." The respondent also mentioned the Parkrose District (suburban Portland) as having adapted a "rather complicated" merit pay plan this year.

(3)

System - Wichita Falls Public Schools
City - Wichita Falls
State - Texas

1971-72 Enrollment - 18,700

Type of Merit Reported

Schedule may be exceeded for merit but amount not indicated.

Response Summary

Respondent indicated that a merit plan had been in effect for about 12 years but had to discontinue the plan for the 1971-72 school year. The plan included three levels based on years of teaching experience and additional graduate hours beyond the bachelor's degree. Teachers must apply on prepared form and be evaluated that year before receiving merit awards for a five or 10 year period.

The reason the plan was abandoned at this time was financially related. State funding in Texas now requires matching funds in some areas from the local district. The amount of matching local funds prohibited the Wichita Falls system from continuing the merit pay plan. The respondent did indicate that, in his opinion, the plan had been successful and that approximately 50 teachers are still receiving merit stipends.

System - San Diego Public Schools
City - San Diego
State - California

1971-72 Enrollment - 130,332

Response Summary

This call was made as a result of an earlier call to Long Beach, California. San Diego now has committees working on an alternate plan to merit pay. The committees have identified problems of quantifying evaluative data. The respondent also indicated that they currently have some types of special assignment positions which may be considered by some as "merit pay" positions.

Included with these summaries is a copy of the progress report from the San Diego Public Schools.

SAN DIEGO CITY SCHOOLS
Personnel Division

PROGRESS REPORT ON MERIT PAY December 7, 1971

Background--By resolutions adopted by the Board of Education August 3, 1971, the superintendent was directed to develop merit pay plan proposals for the teachers and administrators of the San Diego City Schools. In the development of these plans, the superintendent was instructed to involve the employees affected. The resolution further required that the superintendent present his proposals for teacher and administrator merit pay plans no later than March 1, 1972.

Two merit pay committees have been established--one for teachers and another for administrators--with some members serving on both committees. The members on these committees were nominated by the Negotiating Council, the Administrators Association and division heads. Each committee has held five general meetings and in addition several subcommittee meetings have been held.

Data Collection--The Teachers' Merit Pay Committee has reviewed a number of teacher merit plans currently in existence, merit pay articles in professional journals, research reports on merit pay and other literature on the subject. The Administrators' Merit Pay Committee has reviewed merit pay plans currently used by 35 large United States Corporations for their exempt, managerial class employees and has visited two of these corporations to discuss their merit pay plans.

Developing Basic Philosophy--At their very first meetings, both committees registered strong opposition to merit pay in any form. Numerous examples of plans which had been tried and failed were cited. Reasons why these plans had failed were discussed at length. Committee members pointed out the complete absence of a true merit pay plan in any major California school district or, for that matter, in any major United States school district.

The passage of time has not reduced either committee's opposition to merit pay. However, realizing that the superintendent had a mandate from the Board of Education and they (committee members) had been selected to help develop a program under this mandate, the committees addressed themselves to their task by developing a set of principles a merit pay plan would need to meet in order to be successful. To put it another way, given a choice, neither committee would opt for merit pay. But if they were not given a choice and a merit pay program were to be adopted for teachers and administrators of the San Diego City Schools, certain principles would need to be observed in order for the program to have any chance of success.

The two committees developed their principles independently except that there was a free exchange of working drafts in the process. Consequently, there is considerable agreement between the two as is shown in Attachment A. There are, however, significant differences which are also shown in Attachment A. Full texts of the two sets of principles are contained in Attachments B and C.

Next Steps--Both committees feel they have arrived at a critical point in their task. First, they would appreciate the Board's reaction to the guiding principles they have developed. Second, in order to develop the merit pay plans themselves, guidance from the Board is needed in the Following areas:

1. Should the merit pay plan be designed to encourage and reward outstanding performance only, or should it also include provisions for withholding rewards for less than effective performance?

2. Does the Board place high priority on merit pay, a priority high enough to make a continuing commitment to merit pay even in years of severe budgetary limitations?

3. Recognizing the Board's desire to improve instruction, would the Board of Education be willing to consider alternatives to merit pay?

ATTACHMENT A (San Diego, California)

Areas of Agreement--Teacher and Administrator Merit Pay Principles

1. A merit pay plan should be individualized and flexible, should reflect the professional goals of those affected and be compatible with the goals of the district.

2. A merit pay plan will cost more than our present pay plan. As an added cost, its value must be weighed against other needs in the district budget.

3. A merit pay plan must be an added feature of an already sound and attractive professional salary schedule.

4. A merit pay plan must be based on sound evaluative practices and be subject to the grievance procedure.

5. A merit pay plan will increase administrative work loads.

6. The merit pay plan must be free from political control or influence.

7. A merit pay plan must provide a means by which those affected actually plan and implement the system; it must be acceptable to the majority of those affected.

8. A merit pay plan should not provide for the rating of one person against another.

9. Teachers (administrators) must have confidence in the competence and integrity of those doing the merit rating.

10. A merit pay plan must set no limit to the number of individuals who can be rated meritorious.

11. A merit pay plan must be dynamic. It needs procedures for evaluation, change, and improvement.

Areas of Difference--Teacher and Administrator Merit Pay Principles

Teachers

1. A merit pay plan must have as its goal to recognize and reward superior teaching with additional salary; it must not be based upon popularity or be used as a punitive measure.

2. A merit pay plan must allow a teacher to become a merit teacher at anytime during his career. (Implied voluntary participation.)

Administrators

1. A merit pay plan should recognize and reward superior performance; it may also be used to withhold reward for less than effective performance.

2. A merit pay plan should apply to all members of the management team. (Participation compulsory)

3. The initial responsibility for merit rating must rest with the immediate suppervisor

ATTACHMENT B (San Diego, California)

PRINCIPLES FOR SUCCESSFUL TEACHER MERIT PAY PLANS

1. A merit pay plan should be individualized, flexible, reflect the professional goals of those affected and be compatible with the goals of the district. It should include provisions for self evaluation.

2. A good merit pay plan will cost more. It cannot be used as a money saving device. It will increase administrative expense. As an added expense, its value must be weighed against that of other needs in the district budget.

3. A merit pay plan must be an added feature of an already sound and attractive professional salary schedule. A merit pay plan should provide for substantial remuneration above the basic salary schedule.

4. A merit pay plan must have as its goal to recognize and reward superior teaching with additional salary; it must not be based on popularity or be used as a punitive measure. The merit pay system must be free from political control or influence.

5. A merit pay plan requires that the most effective methods be utilized to distinguish between good and superior teaching; such methods must be based on sound evaluation practices and be subject to the grievance procedure.

6. Sufficient time must be provided for implementing and administering the plan.

7. A merit pay plan must provide a means by which those affected actually plan and implement the system; it must be acceptable to the majority of those affected.

8. A merit pay plan should not provide for the rating of one person against another.

9. A merit pay plan must set no limit to the number of teachers who can be meritorious.

10. A merit pay plan must allow a teacher to become a merit teacher at any time during his career.

11. A merit pay plan must be dynamic. It needs procedures for evaluation, change and improvement.

12. Teachers must have confidence in the competence and integrity of those doing the merit rating.

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ATTACHMENT C (San Diego, California)

PRINCIPLES FOR SUCCESSFUL ADMINISTRATOR MERIT PAY PLANS

1. A merit pay plan should be individualized, flexible, reflect the professional goals of those affected and be compatible with the goals of the District.

2. A merit pay plan will cost more. As an added cost, its value must be weighed against that of other priorities in the budget.

3. Sufficient time and resources must be granted to the immediate supervisor for implementing and administering the plan since a merit pay plan will increase administrative work loads.

4. The merit rating system must be free of political control or influence.

5. A merit pay plan should recognize and reward superior performance; it may also be used to withhold reward for less than effective performance.

6. A merit pay plan must be based on sound evaluative practices and be subject to an established grievance procedure.

7. A merit pay plan must be an added feature of a sound and attractive professional salary schedule.

8. A merit pay plan must provide a means by which those affected actually plan and implement the system; it must be acceptable to the majority of those affected.

9. The initial responsibility for merit rating must rest with the immediate supervisor.

*10. Administrators must have confidence in the sincerity and integrity of those doing the merit rating.

11. A merit rating plan identifies at best the outstanding and the less than effective performers--it cannot truly rate all persons in relation to each other.

12. A merit pay plan must set no arbitrary limit to the number of individuals who can be rated meritorious or less than effective.

13. A merit pay plan should apply to all members of the management team.

14. A merit pay plan must be dynamic. It needs procedures for evaluation, change and improvement.

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*This may be deleted in a subsequent revision and placed in the body of the report on merit pay for administrative personnel.